

### Cloud Analytics (CDR-View 2.0) in Collaboration

 On this page, you can find detailed description of the Cloud Analytics (CDR-View 2.0) feature in Collaboration which provides all the information you need to keep on top of your business. Created: July 2023
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- Introduction
- Requirements
- How to access Analytics
- View Different Charts
- Filter Report Data
  - Save filter settings
    - Add a new view
    - Change view
    - Manage views
  - Filter data via values in the report
  - Choose time bucket / filters / sorting via the charts
- Schedule Reports
  - Create scheduled report
  - Manage scheduled reports
- Manage Timezone

### Introduction

Same as CDR-View, Analytics tab in Collaboration allows to monitor the call activity of the employees and get reports related to the number of calls, costs, call duration, usage of trunks, etc, as well as analyze the activity of call agents and response groups.



#### Requirements

- WMS 6.03.20230630.3 or higher on a standalone PBX or a whole WMS Network
- License: UC-Premium
- ACL rules set in WMS:



- can use Analytics: adds display of the Analytics button in Collaboration
- can See analytics: lets to choose which groups data will be available in Analytics reports

#### 💧 Note:

- Analytics data is stored in the AWS datacenter in the region where the PBX is located.
- Analytics is not available if Collaboration is opened via iframe.
- Analytics is not available if there is any licensing issue on the PBX. To enable Cloud analytics, there should be a valid license set, complying with the rule: 1 Customer = 1 set of licenses = 1 WMS Network.

Events sending / data gathering should be enabled in WMS -> PBX -> Features -> Cloud Analytics. Starting from WMS v. 6.06.20240530.1, it is activated by default on all types of PBXs.



• On WMS versions prior to v. 6.06.20240530.1, Cloud Analytics is enabled by default if a PBX or whole WMS Network are running in the Cloud. In case of a standalone Virtual/ Hardware PBX, or if there is a mix of Cloud and Virtual/ Hardware PBXs in a WMS Network, Cloud Analytics should be enabled manually by admin.

Documentation: WMS Settings Menu - Admin Guide (Features section).

#### How to access Analytics

To access Analytics, click on the **Analytics** button at the top of the screen:





### View Different Charts

Collaboration Analytics provides the report data in different charts and you can easily navigate between them by choosing the necessary tab:



The following views are available:

• *Home*: the tab displays call distribution by countries, by status and direction:

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• Simple Grid: includes such data as date, number/ extension, name, direction, status, talk time, etc.

Date ↓	Dialed Number	From Group	From Name	From Number	To Group	To Name	To Number	Direction	Status	Tage
5/10/2024 08:01:15		Sales						OUTBOUND	MISSED	
5/10/2024 08:00:58		Sales						INTERNAL	MISSED	
5/10/2024 07:51:04		Sales						INTERNAL	MISSED	
5/10/2024 07:46:54		Sales						INTERNAL	COMPLETED	
5/10/2024 07:43:46		Sales						OUTBOUND	COMPLETED	
5/10/2024 07:42:42		Sales						OUTBOUND	COMPLETED	
5/10/2024 07:33:15		Sales						OUTBOUND	COMPLETED	
5/10/2024 07:25:28		Sales						OUTBOUND	MISSED	
5/10/2024 07:18:14		{Null}						INBOUND	COMPLETED	
5/10/2024 07:15:41		Sales						OUTBOUND	MISSED	
5/10/2024 07:07:54		Sales						OUTBOUND	COMPLETED	
5/10/2024 07:06:51		Marketing						OUTBOUND	COMPLETED	
5/10/2024 07:04:18		{Null}						INBOUND	COMPLETED	
5/10/2024 07:01:51		Sales						OUTBOUND	COMPLETED	
5/10/2024 07:00:01		Sales						OUTBOUND	COMPLETED	
5/10/2024 06:54:44		Sales						OUTBOUND	COMPLETED	
5/10/2024 06:53:34		Sales						OUTBOUND	COMPLETED	
5/10/2024 06:52:25		Sales						OUTBOUND	COMPLETED	

#### 🔥 Note:

- *Part* refers to the number of transfers, starting from 0. First part of a call is a 0 transfer, the next on is the first transfer (Part=1), etc.
- *Ring Time* displays the time when an agent is being called. In case of a call group, if at least 1 available agent is called, it is considered ring time. If there are no available members in the call group, it is considered wait time. *Wait Time* consists of time spent in IVR, listening to announcements, in queue while no agents are available, and time when the call was put on hold.

In the column with the sound icon, you can download call recordings:

From Name	From Number	To Group	To Name	To Number	Direction	Status	Tags	Ring	Talk Time	4
					2117201110			King		-
					OUTBOUND	MISSED		2	00:00:00	
					INTERNAL	MISSED		0	00:00:00	
					INTERNAL	MISSED		0	00:00:00	
					INTERNAL	COMPLETED		8	00:02:26	
					OUTBOUND	COMPLETED		14	00:01:36	4
					OUTBOUND	COMPLETED		2	00:00:07	4
					OUTBOUND	COMPLETED		57	00:00:35	2
					OUTBOUND	MISSED		28	00:00:00	
					INBOUND	COMPLETED		8	00:09:49	
					OUTBOUND	MISSED		10	00:00:00	
					OUTBOUND	COMPLETED		5	00:06:01	4
					OUTBOUND	COMPLETED		3	00:03:06	
					INBOUND	COMPLETED		2	00:01:18	
					OUTBOUND	COMPLETED		2	00:02:11	۵
					OUTBOUND	COMPLETED		24	00:01:22	4
						a construction				

Showing 1,000 of many rows

When you click on the sound icon, a dedicated window pops up, where you can click on the sound icon again and listen to the call recording or download it:

Simple Grid											
			2				×				
From Na	me From Number	To Group	2024.10.11 16:29:00	718 →	[pbx]	(5aa6e)	*	Rin	g Talk Time	4	Part
Constant of	530		COMPANY OF	(10000000000000000000000000000000000000	OUTBOUND	MISSED		3	00:00:00		0
Concession of the local division of the loca	530				OUTBOUND	MISSED		4	00:00:00		0
Constant of the	530				OUTBOUND	MISSED		6	00:00:00		0
and the second	1129				OUTBOUND	COMPLETED		3	00:02:43		0
Construction of the	718				OUTBOUND	COMPLETED		13	00:01:32	4	0
	688				INTERNAL	COMPLETED		9	00:06:33		0
(and a second	541				OUTBOUND	COMPLETED		19	00:00:21	2	0
and the second se	1100				OUTBOUND	COMPLETED		1	00:02:11	4	0
1000.000	312				INTERNAL	COMPLETED		10	00:05:15		0
and the second se	1100				OUTBOUND	COMPLETED		1	00:03:20	4	0
and the second se	1080				OUTBOUND	COMPLETED		9	00:41:30		0
- Manager Co	614				INTERNAL	MISSED		30	00:00:00		0
- Contractor	541				OUTBOUND	COMPLETED		2	00:00:44	4	0

In case there were multiple recordings of the call, they are all displayed on the pop up window.



- In case of a WMS Network and if CDS is not enabled, you need to be logged in to the PBX, which the recording belongs to. Otherwise, the recording cannot be downloaded.
- Agents: displays data grouped by agents including talk, ring and wait time, as well as the number of completed and missed calls:

Agent ↑	Talk Time	Ring Time	Wait Time	Completed	Missed
Sector Review	00:09:24	00:02:14	00:00:00	4	2
Second Control of Second Contr	00:01:26	00:00:10	00:00:12	2	1
Second Couges	00:11:44	00:00:19	00:00:00	2	0
10.000	00:33:26	00:03:02	00:00:13	5	5
And Statements	00:42:36	00:01:49	00:00:01	1	0
No. 14	00:00:15	00:00:07	00:00:00	1	0
10.100	00:02:11	00:00:09	00:00:12	2	1
1000	00:29:44	00:01:19	00:00:04	0	1
the Malasana	00:05:47	00:00:43	00:00:02	4	1
	00:00:00	00:00:46	00:00:03	0	1
	05:07:45	00:07:19	00:00:06	5	1
	01:01:43	00:04:30	00:00:08	18	8
	00:17:38	00:00:09	00:00:00	ī	1

• *Agents Extended*: displays extended data grouped by agents including talk, ring and wait time, number of completed and missed calls, split by inbound and outbound calls:

Agent         Image: Image	INBOUN         ISING UNC         I	Rir 00:02	Talk			OUND	INDOUNT			
Agent         Talk         Ring         Wait         Missed         Completed         Talk         Ring         Wait         Missed         Completed         Talk         Ring         Wait         Missed           Image: Strain Strai	Wait         Mases         Complete         Talk         Ring         Wait         Mase         Complete         Talk         Ring         Wait         Mase         Complete           V         V         V         000024         000024         000000         Q         A	Rir 00:02	Talk				INBOUND			
Image: Sector	000924         000214         000000         2         4           003328         000302         000013         5         5           004238         000149         000001         0         1	00:02		Completed	Missed	Vait M	Wait	Ring	Talk	gent
0003328       0003328       00013       5       55         0004238       000429       000010       00       1         000128       000128       00012       1       2         00011144       00019       00000       00       2         00011144       000019       00000       0       2         00011144       000019       00000       0       2	00:33:26         00:03:02         00:00:13         5         5           00:42:38         00:01:49         00:00:01         0         1		00:09:24							
004238       000149       000011       0       1         000128       000120       000012       1       2         001144       00019       000000       0       2         000015       000017       000000       0       1         000015       000017       000000       0       1	00:42:36 00:01:49 00:00:01 0 1	00:03	00:33:26							
000126         0000120         1         2           001144         00019         000000         0         2           000015         0000015         000000         0         1		00:01	00:42:36							
001144         000019         000000         0         2           000015         000015         000007         000000         0         1	00:01:26 00:00:10 00:00:12 1 2	00:00	00:01:26							
000015 000000 0 1 1	00:11:44 00:00:19 00:00:00 0 2	00:00	00:11:44							
000211 000000 000012 1 2	00:00:15 00:00:07 00:00:00 0 1	00:00	00:00:15							
00.02.11 00.00.00 00.00.12 1 2	00:02:11 00:00:09 00:00:12 1 2	00:00	00:02:11							
00.29:44 00:01:19 00:00:04 1 0	00.29:44 00.01:19 00.00.04 1 0	00:01	00:29:44							

• *Companies*: displayed data grouped by companies, including the number of missed and completed calls, ring and talk time:

Company ↑	Missed	Completed	Ring Time	Talk Time
	0	2	00:00:17	00:01:11
	0	2	00:01:09	00:01:08
	0	1	00:00:13	00:03:05
	0	1	00:00:08	00:01:27
	0	1	00:00:19	00:00:21
	0	1	00:00:22	00:01:08
	1	1	00:00:29	00:09:18
	0	1	00:00:10	00:00:52
	2	2	00:01:45	00:01:11
	0	1	00:00:22	00:00:34
	1	2	00:00:05	00:02:27

• *Tags*: displays external call statistics (the number of missed and completed calls, ring and talk time) grouped by tags:

a ↓	Missed	Completed	Ring Time	Talk Time	
	0	1	00:01:32	00:16:04	
	0	1	00:00:02	00:02:26	
	0	1	00:00:36	00:03:38	
	1	3	00:06:54	04:19:38	
	1	3	00:03:04	00:09:58	
	0	1	00:01:18	00:21:56	
	0	1	00:01:30	00:41:30	
	0	1	00:00:04	00:04:22	
	0	5	00:05:20	03:13:14	
	0	1	00:00:50	00:12:36	
	0	2	00:00:08	00:46:42	
	0	i	00:01:48	01:28:08	
	0	1	00:00:08	00:01:42	

Further tabs present call data in various charts:

• Line Chart:





• Area Chart:



#### • Pie Chart:



• Bar Chart:



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#### • Column Chart:



#### • Timeline Column Chart:



• *Advanced Grid:* provides extended information compared to Simple Grid including Cost, Service number, PBX information, flags, trunk, tags, service, etc.

Date ↓	Dialed Number	From Name	From Number	From Group	To Name	To Number	To Group	Direction	Status	Cost	Se
15/10/2024 08:26:27	-	-		Sales	-			INTERNAL	MISSED		
15/10/2024 08:24:34				Sales				INTERNAL	COMPLETED		
15/10/2024 08:21:28				Sales				OUTBOUND	COMPLETED		
15/10/2024 08:16:11				Sales				INTERNAL	MISSED		
15/10/2024 08:15:10				Tech Support				INTERNAL	COMPLETED		
15/10/2024 08:03:41				Sales				OUTBOUND	COMPLETED		
15/10/2024 08:02:05				Sales				OUTBOUND	COMPLETED		
15/10/2024 08:01:15				Sales				OUTBOUND	MISSED		
15/10/2024 08:00:58				Sales				INTERNAL	MISSED		
15/10/2024 07:52:48				Sales				OUTBOUND	COMPLETED		
15/10/2024 07:51:04				Sales				INTERNAL	MISSED		
15/10/2024 07:46:54				Sales				INTERNAL	COMPLETED		
15/10/2024 07:43:46				Sales				OUTBOUND	COMPLETED		
15/10/2024 07:42:42				Sales				OUTBOUND	COMPLETED		



#### 🛕 Note:

- *Flow id* is the unique identifier of a call, including all call transfers. For example, you see a call that consists of multiple parts and want to filter all its parts. You can use Flow id for this.
- The columns *From MOS / To MOS* (the Mean Opinion Score) display the caller / callee overall voice call quality. MOS is a rating from 1 to 5 (1 = the lowest score, 5 = the highest score), which is standardized by the International Telecommunications Union ITU-T. Note: Currently, MOS may not be counted for some calls, which should be improved in future releases.
- Service Number column displays a) for an incoming call: the phone number of the trunk a customer called to b) for an outcoming call: the phone number of the trunk via which the outcoming call was made and which is displayed to a customer. For internal calls, the value is Null. Service Number column is available starting from WMS 6.04.
- In the *Flags* column, call flow is marked with flags (which act like tags). Currently, the following flags are available: voicemail, wizyConference, pbxConference, mobility, fax.
- Starting from WMS v. 6.06.20240425.1, there is the column *Cost*, which displays cost for external calls

### Filter Report Data

On the page that opens, you can see a report that displays data according to the filters at the top:

elect view 🗸	ACL Group (Select) Group by Status	Number (Select	ction (Select) Si	tatus (Select) Sen (Select) Service N	vice (Select) Ta	Agent (Select)	Trunk (Select) Se	rial (Select) Ta	ig (Select)	
ome Simple Grid	d Agents Agents	s Extended Com	apanies Tags L	ine Chart Area Cha	rt Pie Chart B	ar Chart Column C	hart Timeline Colu	mn Chart Advar	aced Grid	
nple Grid										
Date ↓	Dialed Number	From Group	From Name	From Number	To Group	To Name	To Number	Direction	Status	Tags
15/10/2024 08:01:15		1000			1		((in a second se	OUTBOUND	MISSED	
15/10/2024 08:00:58								INTERNAL	MISSED	
15/10/2024 07:51:04								INTERNAL	MISSED	
15/10/2024 07:46:54								INTERNAL	COMPLETED	
15/10/2024 07:43:46								OUTBOUND	COMPLETED	
15/10/2024 07:42:42								OUTBOUND	COMPLETED	
15/10/2024 07:33:15								OUTBOUND	COMPLETED	
15/10/2024 07:25:28								OUTBOUND	MISSED	
15/10/2024 07:18:14								INBOUND	COMPLETED	
15/10/2024 07:15:41								OUTBOUND	MISSED	
15/10/2024 07:07:54								OUTBOUND	COMPLETED	
15/10/2024 07:06:51								OUTBOUND	COMPLETED	
15/10/2024 07:04:18								INBOUND	COMPLETED	
15/10/2024 07:01:51								OUTBOUND	COMPLETED	
15/10/2024 07:00:01								OUTBOUND	COMPLETED	
15/10/2024 06:54:44								OUTBOUND	COMPLETED	
15/10/2024 06:53:34								OUTBOUND	COMPLETED	

When you click on a filter, a pop-up window appears, which allows you to choose by which parameters you want to filter the report. E.g. clicking on the filter *Direction (1)*, you can select inbound/internal/outbound calls (2):

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•	<b>_1</b>									e
Direction (Select)	Service (Select)	Talk Time (Sel	lect) Trunk cl			Select)	ACL Group marketin	Numt	per (Select)	
- Demonstration and an archite				Direction						
Department marke	Timezone GMI	I+2 Group	b by Status							
Data Grid Line C	hart Area Chart Pie	Chart Bar Ch	nart Column Ch	Include Exclude	+ Add values in bulk					
				Q Search	×					
Data grid				0 selected						
				(Ni di)	0					
Data I	flow 1d	Dent D	island Number			To Mumber	To 401 Comm	Country	Disection	Channel
Date U	Flow Id	Part D	naled Number	INBOUND		To Number	To ACL Group	Country	Direction	Status
16/06/2023 09:01:58		1	(and the second s	INTERNAL		1000	Marketing	FR	INBOUND	COMPLETED
16/06/2023 00:07:43		1		OUTBOUND			Marketing	US	INBOUND	COMPLETED
15/06/2023 20:41:13		1					Marketing	US	INBOUND	COMPLETED
15/06/2023 14:11:48		1	Summer of the local division of the local di				Marketing	FR	INBOUND	COMPLETED
15/06/2023 14:11:07		1				and the second se			OUTBOUND	COMPLETED
15/06/2023 13:00:13		1	In the local division of the local divisione				Marketing	ES	INBOUND	COMPLETED
15/06/2023 12:12:00		1				1.66	SAT		INTERNAL	COMPLETED
15/06/2023 10:39:22		1	(an or other states)			5.00 7*	Marketing	ES	INBOUND	COMPLETED
15/06/2023 10:06:50		0					Marketing	FR	INBOUND	MISSED
14/06/2023 18:03:41		1			Canaal		SAT		INTERNAL	COMPLETED
14/06/2023 17:44:25		ï			Cancel Apply		Marketing	ES	INBOUND	COMPLETED
14/06/2023 15:58:51		1			Marketing		SAT		INTERNAL	COMPLETED
14/06/2023 15:57:00		6 1			Marketing				OUTBOUND	COMPLETED
14/06/2023 14:22:39		1					Marketing	FR	INBOUND	COMPLETED

#### 🛕 Note:

- Currently, the selected filters are cleared after the page is reloaded. However, you can save filter settings for future use (see more in the section *Save filter settings* below).
- It is currently not possible to change the metric. The metric is always the number of calls.
- Only 1000 rows are displayed by default. After scrolling down to the 1000th row, the table loads the next 1000, and so on, until all the filtered data is loaded. However, when you export the filtered data in CSV, the report includes all rows of the filtered data (not only the first 1000).
- It is possibile to filter Cloud Analytics (CDR-View 2.0) data by an individual tag rather than by a string of tags (e.g. in cases when multiple tags are added to a call). Please note that only one tag can be selected as a filter at a time.

#### The filters include:

- Direction: choose if you want to see inbound, internal, or outbound calls
- Service: select the services (Call groups) you want to be displayed
- Talk Time: select talk time (currently, the filter is available in seconds)
- Trunk: choose the trunks to be included in the report
- Tags: select available tags
- *PBX*: choose the necessary PBX serial(s)
- Date: choose the period by which the data should be filtered:
  - Tab Rolling:
    - Yesterday
    - Today
    - This (minute(s), hour(s), day(s), week(s), month(s), quarter(s))
    - Last (number of minute(s), hour(s), day(s), week(s), month(s), quarter(s))
    - Before (<)
    - After (>)
    - On or after (≥)
    - On or before (≤)
    - Week to date
    - Month to date
    - Quarter to date
  - Tab Fixed:



- Between / Not in between
- On (=) / Not on (!=)
- In month and year
- In quarter and year, etc.

Select value for	r:Date			
Rolling Fixe	ed			
Today	^			
This				
Last				
Next	3)			
Before (<)				
After (>)			Cancel Apply	
On or after (≥)		_		
On or before (≤)				

- *Name:* select the user(s) to be included in the report
- ACL Group: select ACL group(s) to be displayed
- *Number:* choose the number/ extension to filter all incoming and outgoing calls to the selected number/ extension
- Department: select the necessary department(s) of PBX users
- *Timezone:* choose the timezone
- Group by: choose if you want to group the data by Status, Direction, Service, Trunk, or PBX.

For most filters, you can choose either to include or exclude data:

ACL Group	
Include Exclude	+ Add values in bulk
Q. Search	×
0 selected	
International Contents	
ingo Maragera	
incompression	
Show unfiltered values (	
	Cancel Apply

### Save filter settings

#### Add a new view

After you've applied filters to the report, you can save the filter settings:

1. Click on the button **Save view** to the left of the filter panel at the top:

	ate On or after Last	1 Weeks Direction	n (Select) Statu	s missed Servi	ce (Select) Serv	rice Number (Se	lect) Trunk (	Select) Seri	ial (Select)		
ve view A	CL Group (Select)	Department (Sele	ct) Talk Time (Se	elect) Tags (Se	lect) Number (S	elect) Agen	t (Select) Cl	lient (Select)	Timezone GM	IT/UTC	
me Simple G	id Agents Agen	nts Extended Com	panies Line Char	rt Area Chart F	Pie Chart Bar Char	t Column Cha	art Timeline C	olumn Chart	Advanced Grid		
anced grid											
te ↓	Dialed Number	From Name	From Number	From Group	To Name	To Number	To Group	Direction	Status	Cost	Service
				1000		(		(10000000)	Contraction of Contra	1000 C	10000

Showing 455 of 455 rows

2. Enter the name of the report with the set of filters you've applied and click **Save**:

Namo	
Test	
Make view available t	o all users
	Cancel Save

#### Change view

The next time you open Analytics, the system automatically opens the report in the saved view. To return to the default view, click on the name of the current view at the top:

# **WWildix**

	ate On or after Last	Department (Selection	n (Select) Statu ct) Talk Time (Se	elect) Tags (Se	ce (Select) Serv	elect) Agen	ect) Irunk (Select) C	Select) Seri	Timezone GMT,	UTC	
ome Simple Gr	d Agents Age	nts Extended Com	panies Line Char	t Area Chart F	Pie Chart Bar Char	t Column Cha	art Timeline C	olumn Chart	Advanced Grid		
vanced grid											
ate ↓	Dialed Number	From Name	From Number	From Group	To Name	To Number	To Group	Direction	Status	Cost	Service I
	-		- 2	- and -		17	-		-	-	

Showing 455 of 455 rows

You can switch another view or **Revert Liveboard**:

Test	p (Select) D	Department (Select)	Talk Time (Select	Tags (Select)	Number (Select	Agent (Sele	ct) Client (S	ielect) Tir	mezone GMT/UTC		
Save view											
Manage views	Agents Agen	nts Extended Com	panies Line Char	Area Chart P	ie Chart Bar Chart	Column Chart	Timeline Col	umn Chart	Advanced Grid		
Reset Liveboard	-										
vanced grid											
ate ↓	Dialed Number	From Name	From Number	From Group	To Name	To Number	To Group	Direction	Status	Cost	Service
		-	1000				_	10000			

#### Manage views

Click on the button to the left of the filters section on the top and select Manage views:

Test	p (Select) D	epartment (Select)	Talk Time (Select	t) Tags (Select)	Number (Select	Agent (Sele	Client (	Select) Tir	mezone GMT/UTC		
Save view											
Manage views	Agents Agen	nts Extended Comp	banies Line Charl	t Area Chart Pie	e Chart Bar Chart	Column Chart	Timeline Co	lumn Chart	Advanced Grid		
Reset Liveboard											
vanced grid											
ate 🧅	Dialed Number	From Name	From Number	From Group	To Name	To Number	To Group	Direction	Status	Cost	Service

Showing 455 of 455 rows

On the Manage views screen, you can rename the view or delete it:

Manage views		
Name	Share to all users	
Test		Delete
		Cancel Save

A Note: The option "Share to all users" is greyed out and not available.

#### Filter data via values in the report

Starting from WMS 6.04, it is possible to filter report data by choosing necessary values right on the report:

- 1. Select the item you want to filter data by (e.g. Internal calls as on the screenshot below)
- 2. Right-click on it and press Filter:

	ACL Group (Select) Group by Status	Department (Selec	Talk Time (Selec	tt) Tags (Select)	Number (Select)	Agent (Select)	Client (Sel	ect) T	imezone GMT	/итс	
ome Simple Gri	d Agents Agents E	Extended Compan	ies Line Chart Are	ea Chart Pie Chart E	Bar Chart Column	Chart Timeline C	Column Charl	Advan	ced Grid		
aple grid											·
npie gna											
From Name	From Number	To Group	To Name	To Number	Direction	Status	Tags	Ring	Talk Time	4	Part
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You can select multiple filters if required (select the item on the report -> right-click on it and press *Filter* again).

To clear the filters, click **Clear all** at the top:

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### Choose time bucket / filters / sorting via the charts

You can also choose time bucket, apply filters or apply preferable sorting directly on the charts. For this, click on the top bottom button (1) ( in our example on the screenshot below it is "Daily Date"), and select the option you need (2):





### Schedule Reports

#### Create scheduled report

Collaboration Analytics allows to configure scheduled reports to have them sent to email(s) at specified interval. To schedule a report, click on the **More** (three dots) button (1) -> choose **Schedule** option (2):

	Date On or after La	ist 1 Weeks Direct	ction (Select) Sta	atus (Select) Se	ervice (Select) S	ervice Number	(Select) Trun	k (Select)	Serial (Select)	୲ୗୄୄୄୄୄୖ
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Showing 1,000 of many rows

On the **Create Schedule** screen that opens, fill out the following fields:

- Name: enter title for your scheduled report
- Description (optional): provide description if required; the description is included in the body of the email
- Frequency:
  - choose the preferred option: Every N minutes / Hourly / Daily / Weekly / Monthly
  - select at which time the report should be sent
  - choose day for sending the scheduled report
- Select views: select which reports you would like to receive. In case you have saved views (reports with applied filters), they are available here.
- Type: choose if you want to receive the report in PDF or CSV

Name and description	Recipients	
Test Report	User name, email or group name	+
Used to identify the schedule (not included in the subject or body of the email)		
Description	Tatiana Bieliakova	×
Description is appended in the body of the email. This input is optional.		
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PDF  V  Show advanced PDF settings		

#### 🛕 Note:

- CSV files are sent only for the visualisations that have tables. Scheduled reports in PDF format are mostly aimed at charts and graphs, while tables may not contain full information. To get complete data in tables (e.g. the list of calls), we recommend using CSV format.
- In CSV files, the fields that start with "+" are automatically added a single quotation mark (') at the beginning of the field.
- For PDF, you can turn the toggle on next to **Show advanced PDF settings** and configure the following options:
  - Format: Liveboard or Visualisations
  - Layout: Landscape or Portrait
  - Select tabs to download: choose if you want to receive all or specific charts only
  - *Branding*: decide if page number should be included
  - *Footer text:* enter text for the footer of the report

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✓ Line Chart	
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Bar Chart	
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Branding	
✓ Include page number	
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• *Recipients*: you are automatically added as recipient of the report. You can also add other users or groups to send the report to



on the Portal. In case you select a group, all users on the PBX (or WMS Network) that belongs to the customer, will receive the scheduled report via email (in case they accessed Analytics at least once).

Click **Save** to save the scheduled report.

#### Manage scheduled reports

To manage your scheduled reports, click the More (three dots) button (1) and select Manage schedules (2):

Select view 🗸	ACL Group (Select	st 1 Weeks Dire	ction (Select) Sta	atus (Select) S	(Select) Number	Service Number	(Select) Tru	nk (Select)	Serial (Select)	Renama
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Date 🕹	Dialed Number	From Name	From Number	From Group	To Name	To Number	To Group	Direction	Status	TML. Request verification
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Date \$	Dialed Number	From Name	From Number	From Group	To Name	To Number	To Group	Direction	Status	TML Request verification

Click **More** (three dots) next to the necessary report, where you get the following options:

- Pause
- Edit
- View run history
- Delete

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Back to Liveboard Manage schedules for C	DRView 2.0					
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Test Report	Scheduled	Tatiana Bieliakova Created 17 minutes ago	1 Recipient	Weekly	PDF	Pause
						Edit View run history Delete
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In case of pausing a scheduled report, its status changes to Paused:

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Name	Status	Created by	Recipients	Frequency	Format	
Test Report	Paused	Tatiana Bieliakova Created 21 hours ago	1 Recipient	Weekly	PDF	
						•
		Showing 1	-1			

You can resume the scheduled report any time.

### Manage Timezone

Timezone is set automatically based on browser settings. In case you want to disable automatic timezone detection and set a different timezone, click on the Settings icon at the right of the screen:

lect view 🗸	Date On or a	after Last 1 W	Veeks Direc	tion (Select)	Status (Select	) Service	e (Select)	Talk Time (Select)	Trunk (Select)	Serial (Select)	Tag (Select)	
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		00:05:47	00:00:43	00:00:02	4	Ĭ						
		00:00:00	00:00:46	00:00:03	0	1						
		05:07:45	00:07:19	00:00:06	5	1						
		01:01:43	00:04:30	00:00:08	18	8						

Disable the toggle **Automatic timezone detection**:

elect view 🗸 Date	on or after Last 1 W	leeks Direc	ction (Select)	Status (Select	) Service	e (Select) Talk Time (Select) Trunk (Select) Serial (Select) Tag (Select)
ACL	Group (Select)	Number (Selec	ct) Departm	nent (Select)	Service Num	mber (Select) Agent (Select) Client (Select) Group by Status
lome Simple Grid A	Agents Agents Ext	tended Com	panies Tags	Line Chart	Area Chart	Pie Chart Bar Chart Column Chart Timeline Column Chart Advanced Grid
ients Stats						
Agent ↑	Talk Time	Ring Time	Wait Time	Completed	Missed	
	00:09:24	00:02:14	00:00:00	4	2	
	00:01:26	00:00:10	00:00:12	2	1	
	00:11:44	00:00:19	00:00:00	2	0	
	00:33:26	00:03:02	00:00:13	5	5	
	00:42:36	00:01:49	00:00:01	1	0	Automatic timezo     detection
	00:00:15	00:00:07	00:00:00	1	0	diotion -
	00:02:11	00:00:09	00:00:12	2	1	
	00:29:44	00:01:19	00:00:04	0	1	N Contraction of the second seco
	00:05:47	00:00:43	00:00:02	4	1	
	00:00:00	00:00:46	00:00:03	0	1	
	05:07:45	00:07:19	00:00:06	5	1	
	01:01:43	00:04:30	00:00:08	18	8	
	00:17:38	00-00-09	00-00-00	1	1	

When automatic timezone detection is disabled, you can find the **Timezone** option in filters and apply the necessary option:

Select view V Date	e On or after Last 1 V	Veeks Direc	tion (Select)	Status (Select	t) Service	(Select) Talk Time (Select) Trunk (Select) Serial (Select) Tag (Select)
ACL	Group (Select)	Number (Selec	t) Departm	nent (Select)	Service Num	aber (Select) Agent (Select) Client (Select) Timezone GMT/UTC
Grou	up by Status					
Home Simple Grid A	Agents Agents Ex	tended Com	panies Tags	Line Chart	Area Chart	Pie Chart Bar Chart Column Chart Timeline Column Chart Advanced Grid
			panies isge			
Agents Stats						
Agent ↑	Talk Time	Ring Time	Wait Time	Completed	Missed	
(Barrow Barrage)	00:09:24	00:02:14	00:00:00	4	2	
	00:01:26	00:00:10	00:00:12	2	1	
	00:11:44	00:00:19	00:00:00	2	0	
	00:33:26	00:03:02	00:00:13	5	5	Automatic timezon detection
	00:52:54	00:01:59	00:00:08	1	0	
	00:00:15	00:00:07	00:00:00	1	0	
	00:02:11	00:00:09	00:00:12	2	1	
	00:29:44	00:01:19	00:00:04	0	1	
	00:05:47	00:00:43	00:00:02	4	1	
	00:00:00	00:00:46	00:00:03	0	1	
	05:15:22	00:07:33	00:00:06	6	1	
	01:09:25	00:04:45	00:00:11	19	9	
	00.17.20	00.00.00	00.00.00		4	